# Files

The Files API can be used to view and manage files stored in Addepar, as well as the groups and entities associated with the files.

| | |
|---|---|
| Base Route | /v1/files |
| Endpoints | **GET**<br>/v1/files/:id<br>/v1/files<br>/v1/files/:id/download<br>/v1/archive/files/:id<br>/v1/archive/files/:id/download<br>/v1/files/:id/relationships/associated_groups<br>/v1/files/:idrelationships/associated_entities<br><br>**POST**<br>/v1/files/<br>/v1/files/:id/relationships/associated_groups<br>/v1/files/:id/relationships/associated_entities<br><br>**PATCH**<br>/v1/files/:id<br>/v1/files/:id/relationships/associated_groups<br>/v1/files/:id/relationships/associated_entities<br><br>**DELETE**<br>/v1/files/:id<br>/v1/files/:id/relationships/associated_groups<br>/v1/files/:id/relationships/associated_entities |
| Produces | JSON |
| Pagination | Yes |
| Application Permissions Required | "API Access: Create, edit, and delete"<br><br>"Files: View Only" is required to retrieve and download files. All other operations require "Files: Create, edit and delete" permissions. |
| OAuth Scopes | `FILES` or `FILES_WRITE` |

## Resource Overview

Files are described by the below resource object attributes. Attributes required for creating, updating, or deleting the Files are noted.

| ATTRIBUTE | DESCRIPTION | EXAMPLE |
|---|---|---|
| name | The file's name. String. Required for creation. | `"Sample File.txt"` |
| content_type | The content type of the file. String. Not editable. | `"application/PDF"` |
| created_at | Time stamp of the file's creation. String. ISO 8601 date format. | `"2014-12-01T13:22:40Z"` |
| deleted_at | Time stamp of the file's deletion. String. ISO 8601 date format. | `"2014-12-01T13:22:40Z"` |
| bytes | The size of the file in bytes. Number. Not editable. | `100000` |

## Parameters

The **GET** All Files ( `/v1/files` ), **GET** a Single File ( `/v1/files/:file-id` ), and **GET** All Archived Files ( `/v1/archive/files` ) requests can be filtered using the parameters below. The filters require the ISO 8601 date format.

| PARAMETER | DESCRIPTION | EXAMPLE |
|---|---|---|
| `filter[files] [createdAfter]` | Returns only files created after a specific time. | `/v1/files/?filter[files] [createdAfter]=2017-04-06T20:12:45Z` |
| `filter[files] [createdBefore]` | Returns only files created before a specific time. | `/v1/files/?filter[files] [createdBefore]=2017-04-06T20:12:45Z` |
| `filter[files] [createdAfter] &filter[files] [createdBefore]` | Returns only filters created within a specific time range. | `/v1/files/?filter[files] [createdAfter]=2017-04- 05T20:12:45Z&filter[files] [createdBefore]=2017-04-06T20:12:45Z` |
| `filter[files][entityId]` | Returns only files associated with the specific entity. | `/v1/files?[files][entityId]=100` |
| `filter[files][groupId]` | Returns only files associated with the specific group. | `/v1/files?[files][groupId]=20` |
| `filter[files] [entityId]&filter[files] [groupId]` | If IDs for both an entity and a group are included in a request, the API will ignore the group and return only the files associated with the entity. | `/v1/files?[files] [entityId]=100&filter[files] [groupId]=20` |

## Relationships

| RELATIONSHIP | DESCRIPTION |
|---|---|
| `associated_groups` | Groups associated with a file. |
| `associated_entities` | Entities associated with a file. |

RELATIONSHIPS

```
"relationships": {
    "associated_groups": {
        "links": {
            "self": "/v1/files/123/relationships/associated_groups",
            "related": "/v1/files/123/associated_groups"
        },
        "data": [
            {
                "type": "groups",
                "id": "1234"
            },
            {
                "type": "groups",
                "id": "5678"
            }
        ]
    },
    "associated_entities": {
        "links": {
            "self": "/v1/files/123/relationships/associated_entities",
            "related": "/v1/files/123/associated_entities"
        },
        "data": [
            {
                "type": "entities",
                "id": "10000"
            },
            {
                "type": "entities",
                "id": "10001"
            }
        ]
    },
```

## Get a File

Retrieves details for a specific file, such as when it was created, the type of content it holds, its name and size, and the groups and entities associated with it.

**GET** `/v1/files/:id`

**Example:**

REQUEST    RESPONSE

```
GET https://examplefirm.addepar.com/api/v1/files/123
```

**Response Codes**

- `200 OK` : Success
- `400 Bad Request` : "include" query parameter not allowed
- `403 Forbidden` : Lacking files read permission

## Get All Files

Retrieves a list of all files you have permission to access, as well as details about when each was created, the type of content it holds, its name and size, and the groups and entities associated with it.

**GET** `/v1/files`

**Example:**

```
REQUEST     RESPONSE

GET https://examplefirm.addepar.com/api/v1/files
```

**Response Codes**

- `200 OK` : Success
- `400 Bad Request` : "include" query parameter not allowed
- `403 Forbidden` : Lacking files read permission

## Download a File

Retrieves the raw contents of a specific file.

**GET** `/v1/files/:id/download`

**Example:**

```
REQUEST     RESPONSE

GET https://examplefirm.addepar.com/api/v1/files/123/download
```

**Response Codes**

- `200 OK` : Success
- `403 Forbidden` : Lacking files read permission
- `404 Not Found` : Nonexistent/non-permissioned file ID

## Get an Archived File

Retrieves an archived (deleted) file, as well as information about when it was created, the type of content it holds, its name and size, the groups and entities associated with it, and when it was deleted.

**GET** `/v1/archive/files/:id`

**Example:**

```
REQUEST     RESPONSE

GET https://examplefirm.addepar.com/api/v1/archive/files/319
```

**Response Codes**

- `200 OK` : Success
- `400 Bad Request` : "include" query parameter not allowed
- `403 Forbidden` : Lacking files read permission

## Get All Archived Files

Retrieves a list of all archived (deleted) files, as well as information about when each was created, the type of content it holds, its name and size, the groups and entities associated with it, and when it was deleted.

**GET** `/v1/archive/files`

**Example:**

REQUEST    RESPONSE

```
GET https://examplefirm.addepar.com/api/v1/archive/files
```

**Response Codes**

- `200 OK` : Success
- `400 Bad Request` : "include" query parameter not allowed
- `403 Forbidden` : Lacking files read permission

## Download an Archived File

Retrieves the raw contents of an archived file.

**GET** `/v1/archive/files/:id/download`

**Example:**

REQUEST    RESPONSE

```
GET https://examplefirm.addepar.com/api/v1/archive/files/319/download
```

**Response Codes**

- `200 OK` : Success
- `403 Forbidden` : Lacking files read permission
- `404 Not Found` : Nonexistent/non-permissioned file ID

## Get All Groups Associated with a File

Retrieves the full object of groups associated with the file.

**GET** `/v1/files/:id/relationships/associated_groups`

**Example:**

REQUEST    RESPONSE

```
GET https://examplefirm.addepar.com/api/v1/files/123/relationships/associated_groups
```

## Response Codes

- `200 OK` : Success
- `403 Forbidden` : Lacking file read permission or API permission
- `404 Not Found` : Nonexistent/non-permissioned file ID

## Get All Entities Associated with a File

Retrieves the full object of entities associated with the file.

**GET** `/v1/files/:id/relationships/associated_entities`

### Example:

REQUEST    RESPONSE

```
GET https://examplefirm.addepar.com/api/v1/files/123/relationships/associated_entities
```

## Response Codes

- `200 OK` : Success
- `403 Forbidden` : Lacking file read permission or API permission
- `404 Not Found` : Nonexistent/non-permissioned file ID

## Create a File

Adds a new file to your firm. You can specify the name of the file and the groups and entities associated with the file.

> The file extension provided in the metadata must match the file extension of filename in "Content-Disposition".

**POST** `/v1/files/`

### Example:

REQUEST    RESPONSE

```
POST https://examplefirm.addepar.com/api/v1/files
Content-Type: multipart/form-data; boundary=<UNIQUE_BOUNDARY>
Content-Length: 2198

--<UNIQUE_BOUNDARY>
Content-Disposition: form-data; name="file"; file name="Sample.txt"
Content-Type: text/plain

<RAW_FILE_DATA>

--<UNIQUE_BOUNDARY>
Content-Disposition: form-data; name="metadata"

{
  "data":{
    "type":"files",
    "attributes":{
      "name":"Sample.txt"
    }
  }
}
--<UNIQUE_BOUNDARY>--
```

**Response Codes**

- `201 OK` : Successfully created the file
- `400 Bad Request` : Invalid payload such as non-permissioned entities and groups, or file is missing
- `403 Forbidden` : Lacking file write permission or API permission

## Associate Groups with a File

Adds to the list of groups associated to the file.

**POST** `/v1/files/:id/relationships/associated_groups`

**Example:**

REQUEST     RESPONSE

```
POST https://examplefirm.addepar.com/api/v1/files/123/relationships/associated_groups

{
  "data":[
    {
      "type":"groups",
      "id":"200"
    },
    {
      "type":"groups",
      "id":"201"
    }
  ]
}
```

**Response Codes**

- `204 No Content` : Success
- `400 Bad Request` : Invalid payload such as non-permissioned entities and groups
- `403 Forbidden` : Lacking file write permission or complete access to file and all entities/groups related to file
- `404 Not Found` : Nonexistent/non-permissioned file ID

## Associate Entities with a File

Adds to the list of entities associated to the file.

**POST** `/v1/files/:id/relationships/associated_entities`

**Example:**

REQUEST    RESPONSE

```
POST https://examplefirm.addepar.com/api/v1/files/123/relationships/associated_entities

{
  "data":[
    {
      "type":"entities",
      "id":"100"
    },
    {
      "type":"entities",
      "id":"101"
    }
  ]
}
```

**Response Codes**

- `204 No Content` : Success
- `400 Bad Request` : Invalid payload such as non-permissioned entities and groups
- `403 Forbidden` : Lacking file write permission or complete access to file and all entities/groups related to file
- `404 Not Found` : Nonexistent/non-permissioned file ID

## Update a File

Updates the attributes and relationships for a specific file.

**PATCH** `/v1/files/:id`

**Example:**

REQUEST    RESPONSE

```
PATCH https://examplefirm.addepar.com/api/v1/files/1111

{
  "data":{
    "id":1111,
    "type":"files",
    "attributes":{
      "name":"RenamedFile.txt"
    }
  }
}
```

**Response Codes**

- `200 OK` : Successfully modified the file
- `400 Bad Request` : Invalid payload such as non-permissioned entities and groups
- `403 Forbidden` : Lacking file write permission or complete access to file and all entities/groups related to file
- `404 Not Found` : Nonexistent/non-permissioned file ID

## Replace Groups Associated with a File

Replaces all groups currently associated with different groups.

**PATCH** `/v1/files/:id/relationships/associated_groups`

**Example:**

REQUEST    RESPONSE

```
PATCH https://examplefirm.addepar.com/api/v1/files/123/relationships/associated_groups

{
  "data":[
    {
      "type":"groups",
      "id":"200"
    },
    {
      "type":"groups",
      "id":"201"
    }
  ]
}
```

**ResponseCodes**

- `204 No Content` : Success
- `400 Bad Request` : Invalid payload such as non-permissioned entities and groups
- `403 Forbidden` : Lacking file write permission or complete access to file and all entities/groups related to file
- `404 Not Found` : Nonexistent/non-permissioned file ID

## Replace Entities Associated with a File

Replaces all entities currently associated with different entities.

**PATCH** `/v1/files/:id/relationships/associated_entities`

**Example:**

```
REQUEST     RESPONSE

PATCH https://examplefirm.addepar.com/api/v1/files/123/relationships/associated_entities

{
  "data":[
    {
      "type":"entities",
      "id":"100"
    },
    {
      "type":"entities",
      "id":"101"
    }
  ]
}
```

**Response Codes**

- `204 No Content` : Success
- `400 Bad Request` : Invalid payload such as non-permissioned entities and groups
- `403 Forbidden` : Lacking file write permission or complete access to file and all entities/groups related to file
- `404 Not Found` : Nonexistent/non-permissioned file ID

## Delete a File

Archives a file available in Addepar. The archived file and its associated metadata will remain available through separate routes.

**DELETE** `/v1/files/:id`

**Example:**

```
REQUEST     RESPONSE

DELETE https://examplefirm.addepar.com/api/v1/files/1111
```

**Response Codes**

- `204 No Content` : Success
- `403 Forbidden` : Lacking file write permission or complete access to file and all entities/groups related to file
- `404 Not Found` : Nonexistent/non-permissioned file ID

# Remove Groups Associated with a File

Removes the list of groups specified from the file associations.

**DELETE** `/v1/files/:id/relationships/associated_groups`

**Example:**

REQUEST    RESPONSE

```
DELETE https://examplefirm.addepar.com/api/v1/files/123/relationships/associated_groups

{
  "data":[
    {
      "type":"entities",
      "id":"10000"
    }
  ]
}
```

## Response Codes

- `204 No Content` : Success
- `400 Bad Request` : Invalid payload such as non-permissioned entities and groups
- `403 Forbidden` : Lacking file write permission or complete access to file and all entities/groups related to file
- `404 Not Found` : Nonexistent/non-permissioned file ID

# Remove Entities Associated with a File

Removes the list of entities specified from the file associations.

**DELETE** `/v1/files/:id/relationships/associated_entities`

**Example:**

REQUEST    RESPONSE

```
DELETE https://examplefirm.addepar.com/api/v1/files/123/relationships/associated_entities

{
  "data":[
    {
      "type":"entities",
      "id":"10000"
    }
  ]
}
```

## Response Codes

- `204 No Content` : Success
- `400 Bad Request` : Invalid payload such as non-permissioned entities and groups
- `403 Forbidden` : Lacking file write permission or complete access to file and all entities/groups

related to file
- `404 Not Found` : Nonexistent/non-permissioned file ID

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Addepar is a wealth management platform
that specializes in data aggregation,
analytics and performance reporting.

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Files API

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